



## Client Data System Financial Profiles+ Interface

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### Introduction

This document contains instructions for setting up data integration between Client Data System version 4.1.1 with Profiles+™ Professional.

### Data Integration Setup

1. Select **Start, Programs, Client Data System,** and **CDS for Windows** to open the Client Data System Login dialog box.
2. Specify your Database, User Name, and Password information and then click **OK** to log in to CDS.
3. Click **Database,** point to **Utilities,** and then select **Profiles+ Interface** from the drop-down menu.
4. Click **Yes** to continue.
5. Click **Yes** to exit the application.  
**Note:** After CDS closes, the program is ready to integrate with Profiles+ Professional.
6. Open Windows Explorer and locate the folder where Profiles+ Professional is installed (typically C:\FPW).
7. Open the folder where Profiles+ is installed and then double-click on the **CDSNotificationServer.exe** file.  
**Note:** Although there is no visible activity, Profiles+ Professional has been notified that you will be using CDS.
8. Open Profiles+ Professional and **Open an Existing Case.**
9. Click **Utilities** and then select **Options.**
10. Select the **Data Integration** tab.
11. Select the **Enable CDS Integration** option.
12. Close Profiles+ Professional.
13. Select **Start, Programs, Client Data System,** and **CDS for Windows** to open the Client Data System Login dialog box.
14. Specify your Database, User Name and Password information and then click **OK** to log in to CDS.
15. Select **Contact** from the **File** menu.

16. Enter a Contact name that holds investments into the Last Name field and then click **OK** to open the **Personal** tab.
17. Select **Investments** from the **Tools** drop-down menu to open the Investment **Summary** tab.
18. Select an investment record and then click the **Detail** tab.
19. In the **Export** field, select the Asset type from the drop-down menu that appropriately defines the asset.
20. Assign an Asset type to each asset using this method.
21. Click the **Close** button to return to the Contact record.
22. Select **Link to Profiles+** from the **Tools** drop-down menu to open Profiles+ Professional.
23. Open Profiles+ Professional to the previously opened case and note the following:
  - The common data fields are read-only. You will not be able to edit the content from within Profiles+ Professional. However, the fields can be edited in Proposed mode.
  - To enable read and write attributes to these fields, perform a **Save As** or **Export Client File** function in Profiles+. Both options are available from the **File** menu.
  - If you perform either a **Save As** or **Export Client File** function, the case becomes disassociated from CDS and **cannot be updated** with future changes made to CDS data.

If you have any issues contact Technical Support from 6:00 a.m. to 5:00 p.m. PST (Monday through Friday), or you can e-mail your inquiries to [techsupport@profiles.com](mailto:techsupport@profiles.com).

You can also contact Planning Support from 7:00 a.m. to 5:00 p.m. PST (Monday through Friday), or e-mail your inquiries to [planningsupport@profiles.com](mailto:planningsupport@profiles.com). Please have your Customer ID Number (CUID) ready when you phone. Select **About Profiles+ Professional** from the **Help** menu to find the CUID.